



The State Bar of California

Earn up to 10
Hours MCLE Credit
(Includes Legal Ethics, Competence
Issues, Elimination of Bias &
Legal Specialization)

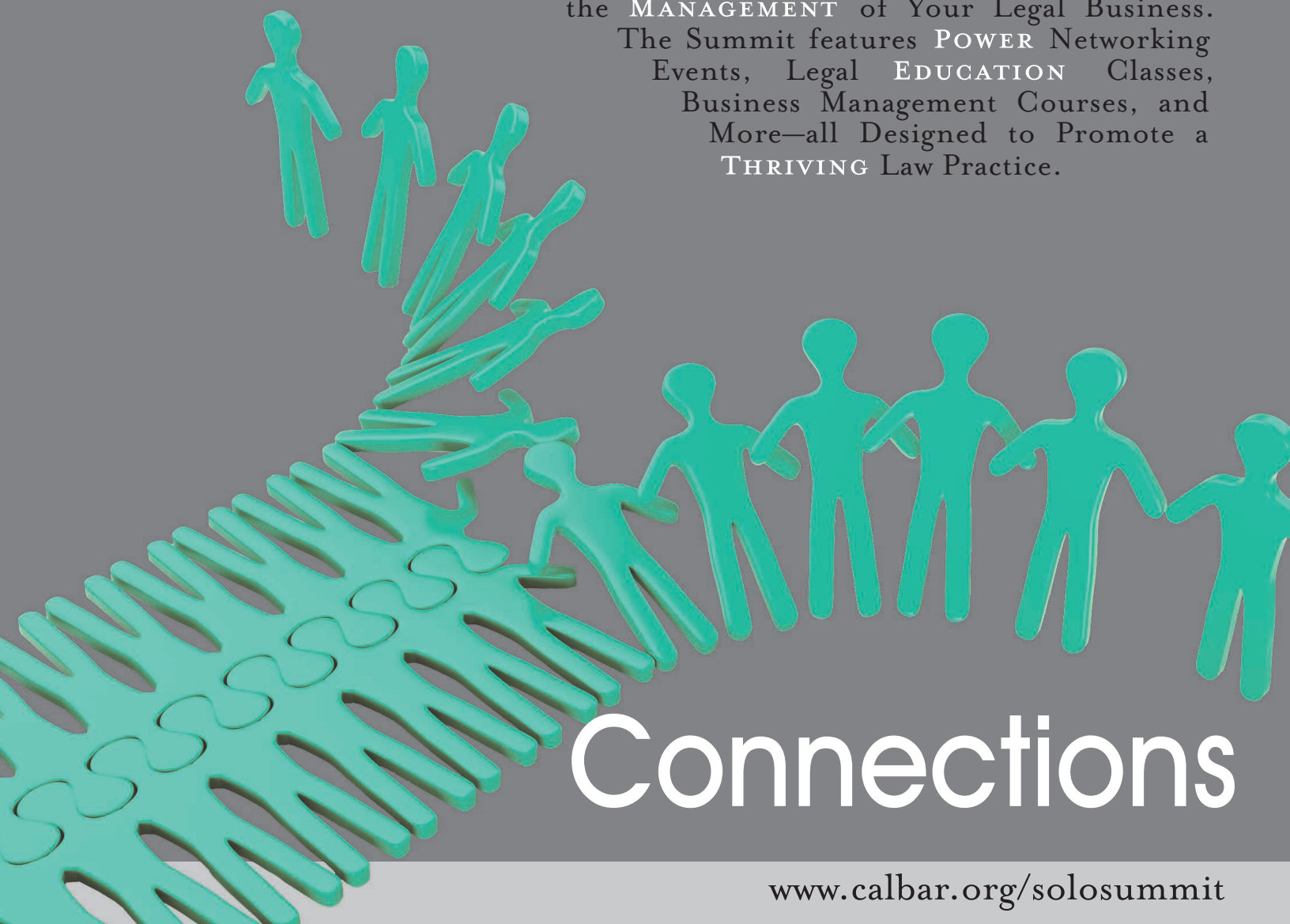
California Solo & Small Firm Summit

June 16 – 18, 2016

Newport Beach Marriott Hotel & Spa

The Summit is **THE** Event of the Year for California's Solo and Small Firm Practitioners and Office Staff! Expand Your **NETWORK** Knowledge and Skills, and **LEARN** Key Approaches to **BUILD** a Successful Client Referral Network. Take away Strategic **SOLUTIONS** for the Practice of Law and the **MANAGEMENT** of Your Legal Business.

The Summit features **POWER** Networking Events, Legal **EDUCATION** Classes, Business Management Courses, and More—all Designed to Promote a **THRIVING** Law Practice.



Connections

www.calbar.org/solosummit



The State Bar of California

This is not your ordinary weekend CLE program!

Why You Should Join Us!

The Summit content is geared to California attorneys who are in a solo or small firm practice. One low registration fee gives full choice among more than 30 workshops and programs, and much more!

Earn up to 10 hours of MCLE credit.

Get credit in *Legal Ethics, Elimination of Bias in the Legal Profession, and Detection/Prevention of substance Abuse Competence Issues*. Select courses also offer legal specialization credit.

Registration includes admission to education programs, program materials, continental breakfast and lunch for paid registrants only.

Receive a USB drive containing a set of comprehensive materials providing up-to-date information on the new issues and trends in the law.

Visit with vendors exhibiting products and services tailored to Solo & Small Firm Practitioners.

Have your learning environment serve as the perfect summer getaway for you, your family and friends.

Register Online at www.calbar.org/solosummit

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The State Bar of California is a State Bar of California approved MCLE provider.

Come prepared to take away workable strategies to manage your office, build a client referral network, and stay on top of key developments in various substantive areas of law.

SCHEDULE AT A GLANCE

Thursday, June 16, 2016

11:30 am	Opening General Session & Lunch
1:15 pm	Concurrent Workshops
5:00 pm	General Session & Daily Wrap-Up
6:00 pm	Open Night Reception
All Day	Exhibits Open

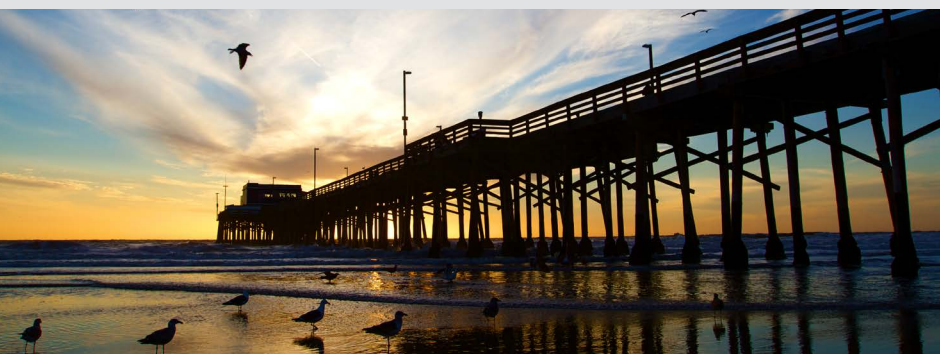
Friday, June 17, 2016

8:30 am	General Session & Continental Breakfast
9:45 am	Concurrent Sessions
12:15 pm	Lunch
1:30 pm	Concurrent Sessions
4:00 pm	General Session & Wrap-Up
5:00 pm	Solo & Small Firm Section Myer Sankary Award Reception
All Day	Exhibits Open

Saturday, June 18, 2016

8:00 am	Continental Breakfast
8:30 am	Concurrent Sessions
12:00 noon	End of Day—Time to Enjoy the Local Area

**California Solo & Small Firm
Summit Partner**





Thursday, June 16, 2016
11:30 AM - 1:00 PM

(1) Opening General Session and Lunch: Building a 7-Figure Lifestyle Law Firm: Upscaling from a Job, to a Practice, to a Business

There are 3 stages every law firm goes through to break the 7-figure barrier. At each stage there are challenges that must be faced and changes that must be made. This program will highlight the 5 key challenges attorneys need to face to grow to the next level, and the 10 major parts of every successful law firm. Learn the specific steps you must take to build a lifestyle law firm that provides the income you want to enjoy the life you want.

MCLE: Not for MCLE Credit
Speaker: Stephen Fairley

Thursday, June 16, 2016
1:15 PM - 2:15 PM

(2) Social Media & Ethics

This program will address the ethical implications that may arise with social media postings on platforms such as Facebook and Twitter. Learn what constitutes advertising, client “contact”, when an attorney-client relationship is created, and more. The speaker will show real-world examples of tweets and Facebook postings that are both proper and improper under the rules of professional conduct, and discuss how to protect yourself on social media sites by indicating that the content may contain attorney advertising.

MCLE: 1.0 Hour Legal Ethics
Speaker: Lauren Wood

(3) What Notorious Characters Teach About Confidentiality and Privilege

This program will offer a refresher on confidentiality and privilege. Learn how the confidentiality rules work by looking at them from a different perspective. See how serial killers help illustrate the inner workings of the rules, and how Wall Street actually helped shape the rules on confidentiality and privilege.

MCLE: 1.0 Hour Legal Ethics
Speaker: Stuart Teicher

(4) Strategic Considerations for Business Succession: Planned and Unplanned

This program will discuss the what, why, when and how of business succession. Learn about the key issues to consider when ownership transfers from one person to another, whether planned or not; the applicable documents; and how to evaluate common structures for such transfers. Panelists will focus on how lawyers can offer practical solutions to common problems that business owners face in the areas of succession.

MCLE: 1.0 Hour
Speakers: Robert Conca, Natalie Stillman

Thursday, June 16, 2016
2:30 PM - 3:30 PM

(5) Settlement is Awesome—Don’t Mess It Up!

This program will address ethical and legal issues in the settlement process. Topics will include mediation confidentiality, insufficient/excessive settlement suits by clients, good faith orders pursuant to Code of Civil Procedure § 877.6, barring future claims, indemnity agreements as to parties and counsel, and enforcing settlements pursuant to CCP § 664.6.

MCLE: 1.0 Hour Legal Ethics
Speakers: Randall Miller, Glen R. Olson

(6) Build a Vibrant Law Firm Before Things Get Complicated!

Lawyers are often so absorbed in cases they miss significant concerns of clients and employees. This program will examine the key elements to building a firm that will serve you, your clients and staff for years. Learn about communication, mission, leadership, strategic thinking and planning, policies, procedures and practices, and effective management.

MCLE: 1.0 Hour
Speaker: Dennis McCue



The State Bar of California

(7) Tech Tock, Tech Tock: Social Media and the Countdown to Your Ethical Demise

Social media is part of the legal landscape and technology is charging forward; but, the ethics rules are struggling to keep up. Sure, there are obvious concerns that everyone is talking about (confidentiality), but there are hidden hazards that few people consider (trial publicity concerns...really?) Join “the CLE Performer” Stuart Teicher, Esq., as he reviews ethics opinions from across the country and explains the rules in a substantive but mildly humorous way.

MCLE: 1.0 Hour Legal Ethics

Speaker: Stuart Teicher

Thursday, June 16, 2016
3:45 PM - 4:45 PM

(8) Taking the Next Step—Evolving from Solo to Small Firm

This program will cover considerations in moving from a solo practice to starting a small firm, including the benefits and drawbacks of each. Learn how to hire your first associate, alternatives and hybrid arrangements, considerations, recommendations, tips, and tricks, and the importance of maintaining integrity and ethics.

MCLE: 1.0 Hour

Speakers: Peter N. Brewer, Peter M. Rehon

(9) Taking the Leap: When to Hire Employees, and How to Make it Work

Solo practitioners often wonder whether to take the plunge and hire staff. This program will explore the pros and cons of taking on employees, the top challenges presented by becoming the boss, and the strategies for success. Like any relationship, the employee-employer relationship takes commitment and effective communication. Learn tips for effective performance feedback to enhance success.

MCLE: 1.0 Hour

Speakers: James Cahalan, Deborah Maddux

(10) Getting Paid: The Relationship Between Your Billings and Fee Agreements

Did you know that if your bills do not comply with Business and Professions Code §6148(b), your entire fee agreement is voidable? This program will cover the requirements for an enforceable engagement agreement, proper billing practices and ways to avoid getting into trouble with clients and the State Bar. Learn about block billing, charging for paralegals, team meetings, and other billing issues.

MCLE: 1.0 Hour Legal Ethics

Legal Specialization: 1.0 Hour Legal Malpractice

Speakers: Carole Buckner, Nick Migliaccio

Thursday, June 16, 2016
5:00 PM - 6:00 PM

(11) General Session and Wrap Up: Top 10 Mistakes Lawyers Make That Kill Their Intake & Lead Conversion Rate...And How To Fix It!

Lead generation is expensive! Companies will sell you SEO, PPC, direct mail, TV advertising, and PPL (pay per lead), but who will help you convert more of these costly leads into more retained clients? Is the person who answers your phone doing everything they can to convert? Do you have a simple system in place to track all of your leads and measure your true conversion rate to determine if you are making a profit on these leads? At this program you will learn the five stages of lead conversion; seven strategies to immediately double your lead conversion rate; how to implement a simple system to track your leads; and how to overcome pricing objections.

MCLE: Not for MCLE Credit

Speaker: Stephen Fairley

Thursday, June 16, 2016
6:00 PM - 7:00 PM

(12) Opening Night Reception

Connections—meet and learn from your peers during the Summit’s opening night networking event. Visit with vendors ready to showcase products and services geared especially for solo and small firm practitioners. Please RSVP for this event on the course selector.



Friday, June 17, 2016
8:30 AM - 9:30 AM

(13) General Session and Continental Breakfast: Leveraging the Power of Social Media (Part 1): Using Facebook and Content Marketing to Get More Leads

Facebook and content marketing are two of the most cost effective ways to generate high quality leads to your law firm. Many law firms have tried social media and failed because they didn't have a proven blueprint that shows them exactly how to do it...until now! At this information-packed session you will learn about the three biggest mistakes lawyers make with social media and how to avoid them; seven strategies to tap into the power of Facebook; how to get qualified leads on Facebook; using content marketing to position yourself as an industry thought leader, and more!

MCLE: Not for MCLE Credit

Speaker: Stephen Fairley

Friday, June 17, 2016
9:45 AM - 10:45 AM

(14) Practical Tips on Locating Insurance for Your Law Practice

Insurance either funds or is involved in two-thirds of all civil litigation. This program will review strategies and methods of uncovering insurance policies which can be applied in every litigators practice. Speaker will address hypothetical situations where first party and third party coverage's are commonly overlooked by both plaintiffs and defense counsel.

MCLE: 1.0 Hour

Speakers: William Hanagami, Demian Oksenendler

(15) Let's Make a Deal: The Ethics of Negotiation

Does anyone really expect anything a lawyer says in negotiation to be truthful? Does that expectation impact an attorney's ethical duties, including the duty of honesty? May an attorney ethically "gild the lily" in settlement negotiations? This program will explore where the ethical line lies in negotiation and when it is crossed.

MCLE: 1.0 Hour Legal Ethics

Legal Specialization: 1.0 Hour Legal Malpractice

Speakers: Robert D. Brain, Joel A. Osman, Suzanne Burke Spencer

(16) Law Office Technology—Interesting and Useful Tools

This program will cover the essential technology devices and systems useful in law offices and critical in smaller offices, including voice recognition/dictation, video conferencing (three systems), off-site transcription, phone systems (VOIP, auto attendant, call forwarding, etc.), and office management software (Amicus, Abacus, Clio, etc.)

MCLE: 1.0 Hour

Speakers: Peter N. Brewer, Peter M. Rehon

Friday, June 17, 2016
11:00 AM - 12:00 PM

(17) Data Security and Privacy for Solo and Small Law Firms

Data security is not simply a smart risk management step for solo practitioners and small law firms. Specific legal and ethical obligations require law firms to provide data security or their information and that of their clients. This program will provide an overview of those obligations and present strategies for compliance.

MCLE: 1.0 Hour Legal Ethics

Speakers: Dominique-Chantale Alepin, Nicolas Chaillan

(18) ABC's of Arbitration and Mediation—A Basic Primer on How to Do Them

This program will provide an introduction to the two primary alternative dispute resolution methods. Learn about the pros and cons of each method, strategies as to which method may be better in a particular case, and the dos and don'ts for practitioners who don't regularly use ADR.

MCLE: 1.0 Hour

Speakers: Jeff Dasteel, Jill Switzer

(19) Sexual Harassment in the Workplace—What Every Employer Needs to Know in 2016: A Plaintiff and Defense Perspective

This program will provide an overview from the plaintiff's and defense perspective of the laws, cases and regulations pertaining to bringing and defending claims of workplace sexual harassment. Learn how social media impacts workplace harassment claims, and get an update on the recent changes to the Fair Employment & Housing Council's regulations.

MCLE: 1.0 Hour

Speakers: Cynthia Elkins, Teresa McQueen



The State Bar of California

Friday, June 17, 2016
12:15 PM - 1:15 PM

(20) Friday Lunch Program—Guess Who's Coming to Court

This program will examine the hidden manifestations of bias in the interpersonal relationships among lawyers, and how it's being dealt with by ethics rules across the country.

MCLE: 1.0 Hour Elimination of Bias
Speaker: Stuart Teicher

Friday, June 17, 2016
1:30 PM - 2:30 PM

(21) Ten Tips to Run Your Firm Well, Profitably, and Ethically

This program will present ways to provide high-quality, cost-effective legal services, while maintaining a healthy balance with personal life. Learn about business systems, marketing plans, cultivation of a healthy law firm culture, being generous in all aspects of one's life, office and law practice efficiency, prudent and ethical business decisions, developing trusting relationships, and staying current in the law and ethics.

MCLE: 1.0 Hour Competence Issues
Speakers: Peter N. Brewer, Peter M. Rehon

(22) It Takes All Kinds: The Ethics of Dealing with Difficult Personalities

This program will address the practical and ethical issues that arise when a lawyer finds him or herself dealing with a difficult personality—whether it be an obnoxious opposing counsel, an unrealistic and demanding client, a cantankerous judge, or a difficult member of the public.

MCLE: 1.0 Legal Ethics
Legal Specialization: 1.0 Hour Legal Malpractice
Speakers: Eric Deitz, Scott Garner, David Majchrzak

(23) Social Media and Reputation Management for Small Law Firms

This program will review the advantages and risks of law firms using social media and how best to protect their reputation online. Panelists also will cover the ethical rules governing use of social media and responding to consumer reviews.

MCLE: 1.0 Hour of Which 0.5 Hour Applies to Legal Ethics
Speakers: Heather Antoine, Bennet Kelley

Friday, June 17, 2016
2:45 PM - 3:45 PM

(24) Client Trust Accounting

An experienced prosecutor from the State Bar of California's Office of Chief Trial Counsel will provide an overview of attorneys' client trust accounting responsibilities pursuant to the California Rules of Professional Conduct and relevant case law. Take away practical information to avoid ethical problems in handling client trust funds.

MCLE: 1.0 Hour Legal Ethics
Speaker: Charles Calix

(25) What Litigators Wish Transactional Lawyers Knew

This program will provide tips for drafting contracts, real property transactions and estate plans that can avoid litigation and malpractice, or at least make a subsequent litigator's job easier.

MCLE: 1.0 Hour of Which 0.5 Hour Applies to Legal Ethics
Speakers: Nancy B. Goldstein, Mark Share, Susan Share

(26) The Basics of Litigating Internal Trust Matters

This entry-level course will focus on disputes between trustees and beneficiaries under the Probate Code's statutory scheme governing litigation regarding the internal affairs of a trust. The program is designed as both an introduction to those who may be new to the field and a review for more experienced practitioners.

MCLE: 1.0 Hour
Legal Specialization: 1.0 Hour Estate Planning Trust & Probate Law
Speaker: James P. Lamping

Friday, June 17, 2016
4:00 PM - 5:00 PM

(27) General Session and Wrap Up: Leveraging the Power of Social Media (Part 2): From LinkedIn to Lunch

LinkedIn is a powerful tool to build referral relationships for your law firm. This fast paced session will cover the 10 steps to jumpstarting your marketing efforts on LinkedIn, and how to go from LinkedIn to lunch. Learn how to create a powerful profile; how to ethically increase your profile views; where to quickly find hundreds of potential referral partners; and how to approach referral partners online and build the relationship offline.

MCLE: Not for MCLE Credit
Speaker: Stephen Fairley



Friday, June 17, 2016

5:00 PM - 6:00 PM

Solo and Small Firm Section Myer J. Sankary Award Reception

The Solo and Small Firm Section will present its 2016 Attorney of the Year Award. Please join us for a cocktail reception for the announcement of the winner and the award presentation.

Saturday, June 18, 2016

8:00 AM - 8:30 AM

(28) Continental Breakfast Available (no program)

Saturday, June 18, 2016

8:30 AM - 9:30 AM

(29) Getting it Right: Private Workplace Policies and Handbooks and Ethical Guidelines

This program will cover non-legal and legal workplace handbooks and policies needing special attention in light of developments affecting social media policies, confidentiality rules, and other handbook policies. Particular emphasis will be placed on the increased growth of the NLRB in the private workplace, as well as the ethical rules governing the use of social media in the legal workplace, with an emphasis on attorney communications.

MCLE: 1.0 Hour of Which 0.5 Hour Applies to Legal Ethics

Speakers: Samson Elsbernd, Thomas Lenz

(30) Spotting Hidden IP in Your Law Practice

Not all intellectual property comes with a label stamped on it. Business litigators, estate planners, employment lawyers, corporate counsel and family lawyers will all benefit from learning how to spot intellectual property assets and issues that lie just beneath the surface.

MCLE: 1.0 Hour

Speaker: Robert W. Payne

(31) Courtroom Etiquette and Demeanor

This basic seminar will focus on how to make the best appearance in the courtroom to better present your case and make a favorable impression before the judge, court staff and a jury from the perspective of the judicial officers and attorneys.

MCLE: 1.0 Hour of Which 0.5 Hour Applies to Legal Ethics

Legal Specialization: 1.0 Hour Criminal Law

Speakers: Hon. Marguerite D. Downing,
Hon. Darrell Mavis, Lei-Chala I. Wilson

Saturday, June 18, 2016

9:45 AM - 10:45 AM

(32) Legal Advertising in Cyberspace and Social Media: Ethical Implications

This program will cover the legal and ethical rules that govern attorney advertising in the virtual world. Learn how to craft those brilliant ads in a way that will increase your business, and save your Bar card.

MCLE: 1.0 Hour Legal Ethics

Speakers: David Cameron Carr, Edward J. McIntyre,
Wendy Lynn Patrick

(33) Tax Tips for Law Firms

Law firms, like any other business, face tax issues and can enjoy similar tax benefits. Neglecting tax implications and strategic planning techniques may increase your law firm's costs through missed savings opportunities, increased taxes, compliance costs, accounting costs, penalties and fees. Learn important tax tips to ensure accuracy, compliance and overall tax savings for your law firm.

MCLE: 1.0 Hour

Legal Specialization: 1.0 Hour Taxation

Speakers: Thomas A. Lamons, Joseph P. Wilson



The State Bar of California

(34) Starting a High Volume Law Firm & How to Manage the First Few Months

This program will provide the essentials of forming and managing a law practice. Learn about opening and establishing a law office, personnel and hiring practices from the inception of the firm and through growth, procedures for high volume practice, and managing government (city, county and state) agency requirements in operating a law firm with a workers' compensation law emphasis.

MCLE: 1.0 Hour

Legal Specialization: 1.0 Hour Workers' Compensation Law

Speakers: Monica E. Fairwell, Craig A. Glass

Saturday, June 18, 2016
11:00 AM - 12:00 PM

(35) Rule 3-110 and Substance Abuse: A Judicial Perspective

Retired Superior Court Judge Louis Rodriguez and ethics expert Wendy Patrick will discuss the obligations of attorneys under California Rule of Court 3-110 (duty to act competently) as they relate to substance abuse, examining the current case law and disciplinary procedures for violations.

MCLE: 1.0 Hour Competence Issues

Speakers: David Cameron Carr, Wendy Lynn Patrick, Hon. Luis A. Rodriguez

(36) What To Do When a Bankruptcy Case Falls On Your Desk

This program will guide non-bankruptcy attorneys through the basics of handling a case. Learn what it means when a bankruptcy is filed, whether it is permissible to do business with or enter into a contract with someone in bankruptcy, how attorneys are noticed of important bankruptcy events, and the relevant deadlines applicable to a bankruptcy filing.

MCLE: 1.0 Hour

Speakers: Marcus Colabianchi, Mike DeLaney

(37) Family Law, A Holistic Approach

Learn how to align your client's case strategy with tactics that will get you there. This program will cover the Petition to Judgment and everything in between, including custody, support, property division, procedure, alternative methods of resolution, current topics including 'date of separation' and plenty of working examples. This fast-paced, information-filled presentation is intended for the family law novice to specialist.

MCLE: 1.0 Hour

Legal Specialization: 1.0 Hour Family Law

Speaker: Mark Ressa





GENERAL INFORMATION & HOTEL RESERVATIONS

Newport Beach is a beautiful and convenient destination for the 2016 California Solo & Small Firm Summit. We can plan an exceptional educational program for you in a destination with many fun, local attractions for the family and friends who may be joining you.

KEY DEADLINES

May 25 Hotel Reservation Deadline

June 9 Pre-registration Deadline

TRANSPORTATION AND PARKING

The Newport Beach Marriott Hotel & Spa is located in beautiful Newport Beach. Discover unparalleled beauty and relaxing luxury at the Newport Beach Marriott Hotel & Spa. Near our hotel in Newport Beach, you'll find championship golf, colorful attractions, and world-class shopping. Indulge in the classic Southern California lifestyle at this one-of-a-kind Newport Beach Hotel & Spa. Nearby airport is John Wayne Airport—Orange County—SNA.

Discounted Event Day Parking is being offered at \$15 for self-parking. Valet parking is \$35.

REGISTRATION/PROGRAM & SPEAKER CHANGES

Deadline: June 9, 2016

Advance registration deadline is June 9, 2016. Registration fees are outlined on the form. Register online at www.calbar.org/solosummit. Registration refund requests must be in writing and received by June 9, 2016, and are subject to a \$50 service charge. Occasionally changes in the programs are made in response to speaker availability, participant demand or unforeseen circumstances.

QUESTIONS

For registration information please call (415) 538-2508. For program content information or Special Assistance call (415) 538-2242.

HOTEL INFORMATION

Deadline: May 25, 2016

Only \$189 plus tax, per night

Help us keep the Summit registration fees low, by booking your hotel reservation at our headquarter property hotel.

**Newport Beach Marriott Hotel & Spa
900 Newport Center Drive
Newport Beach, CA 92660**

A block of rooms has been reserved at the Newport Beach Hotel & Spa at the special Summit rate of \$189 single or double occupancy. **Reservations must be made by May 25.** Don't wait to book your reservations as the hotel block may sell out before the May 25 deadline. **Book your reservations online:** <https://resweb.passkey.com/go/StateBarSoloSummit> or by calling **877-622-3056**. Mention The State Bar of California Solo & Small Firm Summit to get the group rate.





**SIGN
ME UP!**

REGISTRATION FORM

USE A SEPARATE FORM FOR EACH REGISTRANT

DEADLINE: JUNE 9, 2016

For advance registration complete this Registration Form and the Course Selector on the next page.

*Keep a photocopy for your records and mail or fax this form before the **June 9** deadline. Fees Increase After June 9.*

REGISTER

For registration information call (415) 538-2508.

ONLINE AT: www.calbar.org/solosummit

BY FAX: (415) 538-2368

*Registrations with credit card payments only.
If advance registration form is faxed, do not mail
the original form. Fax registrations cannot be
confirmed by telephone, but you will receive an
email confirmation*

BY MAIL: Program Registrations/Solo Summit
The State Bar of California
180 Howard Street, San Francisco CA 94105

CA State Bar Number _____

Name _____

Firm _____

Address _____

City/State/Zip _____

Phone _____

Email _____

(Required for email confirmation)

☐ Your contact information may be released to other attendees/
sponsors/exhibitors. Check here if you do not want your contact
information released.

Primary Practice Area _____

Firm/Practice Size: _____ 5 attys _____ 6-50 attys _____ 51+attys

REGISTRATION PAYMENT

Registration fees may be paid by check, VISA or MasterCard (no other credit cards will be accepted.) Make checks payable to The State Bar of California.

Total Amount Enclosed or to be Charged for Registration Fees \$ _____

Select one ☐ VISA ☐ MasterCard

Account Number _____

Expiration Date _____

Cardholder's Name _____

Cardholder's Signature _____

REGISTRATION FEE

Registration includes admission to education programs, program materials, continental breakfast and lunch. (For Paid Registrants Only).

	Registration Fee if Received by June 9	Fee if Received After June 9 and On-site
<input type="radio"/> Attorney	\$425	\$525
<input type="radio"/> Paralegal and other non-attorney legal professional	\$425	\$525

REFUNDS/CANCELLATIONS

Registration refund requests **MUST BE IN WRITING AND BE RECEIVED BY THE STATE BAR OF CALIFORNIA** no later than June 9, 2016 and are subject to a \$50 cancellation fee. Refunds are not available after June 9.

The State Bar of California is a State Bar of California approved MCLE Provider.



Special Needs or Assistance Call (415) 538-2242



COURSE SELECTOR

Name _____ Bar # _____

Use this form to select the events and education courses that you plan to attend. Keep a copy for your records.

Thursday, June 16, 2016

11:30 AM - 1:00 PM

- ☐ [1] Opening General Session and Lunch

1:15 PM - 2:15 PM

- ☐ [2] Social Media & Ethics
- ☐ [3] What Notorious Characters Teach About Confidentiality and Privilege
- ☐ [4] Strategic Considerations for Business Succession: Planned and Unplanned

2:30 PM - 3:30 PM

- ☐ [5] Settlement is Awesome—Don't Mess It Up!
- ☐ [6] Build a Vibrant Law Firm Before Things Get Complicated!
- ☐ [7] Tech Tock, Tech Tock: Social Media and the Countdown to Your Ethical Demise

3:45 PM - 4:45 PM

- ☐ [8] Taking the Next Step—Evolving from Solo to Small Firm
- ☐ [9] Taking the Leap: When to Hire Employees, and How to Make it Work
- ☐ [10] Getting Paid: The Relationship Between Your Billings and Fee Agreements

5:00 PM - 6:00 PM

- ☐ [11] General Session and Wrap Up

6:00 PM - 7:00 PM

- ☐ [12] Opening Night Reception

Friday, June 17, 2016

8:30 AM - 9:30 AM

- ☐ [13] General Session and Continental Breakfast—Social Media Strategy: Using Facebook and LinkedIn to Get More Referrals

9:45 AM - 10:45 AM

- ☐ [14] Practical Tips on Locating Insurance for Your Law Practice
- ☐ [15] Let's Make a Deal: The Ethics of Negotiation
- ☐ [16] Law Office Technology—Interesting and Useful Tools

11:00 AM - 12:00 PM

- ☐ [17] Data Security and Privacy for Solo and Small Law Firms
- ☐ [18] ABC's of Arbitration and Mediation—A Basic Primer on How to Do Them
- ☐ [19] Sexual Harassment in the Workplace—What Every Employer Needs to Know in 2016—A Plaintiff and Defense Perspective

12:15 PM - 1:15 PM

- ☐ [20] Friday Lunch Program—Guess Who's Coming to Court

1:30 PM - 2:30 PM

- ☐ [21] Ten Tips to Run Your Firm Well, Profitably, and Ethically
- ☐ [22] It Takes All Kinds: The Ethics of Dealing with Difficult Personalities
- ☐ [23] Social Media and Reputation Management for Small Law Firms

2:45 PM - 3:45 PM

- ☐ [24] Client Trust Accounting
- ☐ [25] What Litigators Wish Transactional Lawyers Knew
- ☐ [26] The Basics of Litigating Internal Trust Matters

4:00 PM - 5:00 PM

- ☐ [27] General Session and Wrap Up

Saturday, June 18, 2016

8:00 AM - 8:30 AM

- ☐ [28] Continental Breakfast Available (no program)

8:30 AM - 9:30 AM

- ☐ [29] Getting it Right: Private Workplace Policies and Handbooks and Ethical Guidelines
- ☐ [30] Spotting Hidden IP in Your Law Practice
- ☐ [31] Courtroom Etiquette and Demeanor

9:45 AM - 10:45 AM

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- ☐ [35] Rule 3-110 and Substance Abuse: A Judicial Perspective
- ☐ [36] What To Do When a Bankruptcy Case Falls On Your Desk
- ☐ [37] Family Law, A Holistic Approach



The State Bar of California
California Solo & Small Firm Summit
180 Howard Street
San Francisco CA 94105-1639

First Class PRSRT Mail
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Paid
Documentation



The State Bar of California

California Solo & Small Firm Summit

June 16 – 18, 2016
Newport Beach Marriott Hotel & Spa

Hotel Deadline: May 25
Registration Deadline: June 9

JOIN US FOR
the annual 3-day educational summit designed for
solo or small firm practitioners and office staff,
with solutions for lawyering and managing a law practice.
CLE programs in substantive areas most common to
solo or small firm practitioners –
ALL DESIGNED BY THE STATE BAR OF CALIFORNIA.



www.calbar.org/solosummit

